

SUMMARY

COMPLETED

- Acquisitions and Contracts Performance (A&CP) – All SFA contracts were transferred to A&CP for administration. Employees from ED CPO are detailed to assist in the management of legacy contracts and the award of new contracts. A&CP has interviewed and made selections for all vacancies to go forward with the continued management of SFA contracts.
- SFA University – A course celebrating the heritage and mission of student financial assistance was delivered to all SFA employees. *SFA Traditions* introduced several innovations to the way learning programs will be presented in the future. The course resulted in a renewed connection with SFA's history and mission, and provided strong links to the PBO's mission and standards.
- Analysis – Performance Measures has implemented an electronic web-based performance measurement system that will increase the visibility of SFA's annual plan to all employees and automate the bi-weekly reporting process. Training of SFA contacts will be completed by March 21.

GREEN LIGHT













































- Only eight recertifications remain to be performed – out of 132 – to determine the initial cohort of recertification applications for all foreign non-medical schools.
- In the beginning of FY 2001 there were 261,236 borrowers using Electronic Debiting and other electronic methods. Currently the number of borrowers repaying their Direct Loans through Electronic Debiting and other electronic methods is 332,635. An increase of 138,700 borrowers for FY 2001 is required to meet the goal of 400,000. The year-to-date increase of 71,635 represents 52% of the annual goal.

SCHEDULE CHANGES

- Acquisitions and Contracts Performance -- A&CP will complete the training on acquisition management to all SFA managers by September 30, 2001, rather than the March 31, 2001 deadline as stated in the FY 2001 Operating Goals and Improvement Projects. A&CP is working with SFA CFO to identify additional requirements.
- CIO – The Business Case to convert partner interfaces from a private network to the SFA Internet was approved by the IRB. The IRB agreed to a completion date of December 18, 2001, not the September 30, 2001 deadline as stated in the FY 2001 Operating Goals and Improvement Projects.








































PERFORMANCE PLAN INDICATOR STATUS AT A GLANCE*

as of March 2, 2001

	Indicator ¹	Status
Students Channel	Establish a Web portal for students that will provide access to student related online services.	
	Create and launch a new products/services/delivery approach.	
	Launch a single, toll-free "one call does it all" number for student customer service.	
	Answer 95 % of 1-800-4FEDAID calls, and average a four rating (out of five) in weekly service survey.	
	Increase the number of FAFSAs filed electronically from four million last year to five million in FY2001.	
	Process all paper and electronic FAFSAs with an average turnaround time of seven days or less.	
	Upgrade the Student Aid Report (SAR) for the 2002/2003 School year with a plain language letter.	
	Analyze the results of the IRS Phase II statistical study of electronic matching of income data.*	
	Increase to 400,000 the total number of borrowers repaying Direct Loans through Electronic Debiting.	
	Retire Central Data System: transferring necessary functionality to other systems.	
	Process all deferment and forbearance requests within seven days of receipt at the DL Servicing Center.	
	Provide, via the DL Servicing Web site, new Spanish language deferment and forbearance requests.	
	Process Loan Consolidations in 50 days or less.	
	Increase the number of consolidation applications filed electronically by 50% in FY2001.	
	Keep the default recovery rate at 10% or higher.*	
	Implement the National Directory of New Hires database matching program.*	
	Establish a program and multi-year goals to further reduce the cohort and lifetime default rates.*	
Schools Channel	Increase oversight efforts by increasing Program Reviews by 20%.*	
	Educate the foreign school community about SFA program requirements to reduce non-compliance.*	
	Implement a pilot program that prevents students from falsifying enrollment at foreign institutions.*	
	Determine the initial cohort of recertification applications of foreign non-medical schools in FFEL.	
	Keep the cohort default rate under 8%.*	
	Provide each school with single SFA point of contact.	
	Release version 1 of the School Portal.	
	Release version 2 of School Portal.	
	Choose operating partners to assist in building common business processes and systems.	
	Develop and implement a strategy for creating a single "system" of unduplicated school data.	
	Complete 96% of reimbursement requests within 30 days.	
	Develop action plans for at least 90% of the schools on reimbursement.*	
	Resolve 93% of school audits within six month of receipt.*	
	Process 98% of the Direct Loan origination and disbursement records within two days.	
	Process 98% of the Pell funding requests from RFMS receipt through GAPS within 24-36 hours.	
	Migrate the Campus-Based System to a relational database for use in the 2001-2002 FISAP filing.	
	Provide Direct Loan schools with results of PLUS loan credit checks within two days.	
	Eliminate the Mid-Term Financial Aid Transcripts.	
	Maintain the viability and competitiveness of the Direct Loan Program.	
	Provide Direct Loan schools with results of on-line entrance counseling electronically.	
Financial Partners Channel	Establish a program and multi-year goals to further reduce the cohort and lifetime default rates.*	
	Establish Web portal for Financial Partners to provide one stop access to SFA services and information.	
	Design and implement improvements to the core business functions.	
	Implement and monitor at least four voluntary flexible agreements for program participation.	
	Submit a report to Congress on the viability of expanding the VFA "pilot".	
	Implement a centralized processing pilot project to eliminate false death and disability claims.*	
	Complete investigative analysis on the remaining 1,300 discharges identified from the IG audit.*	

PERFORMANCE PLAN INDICATOR STATUS AT A GLANCE*

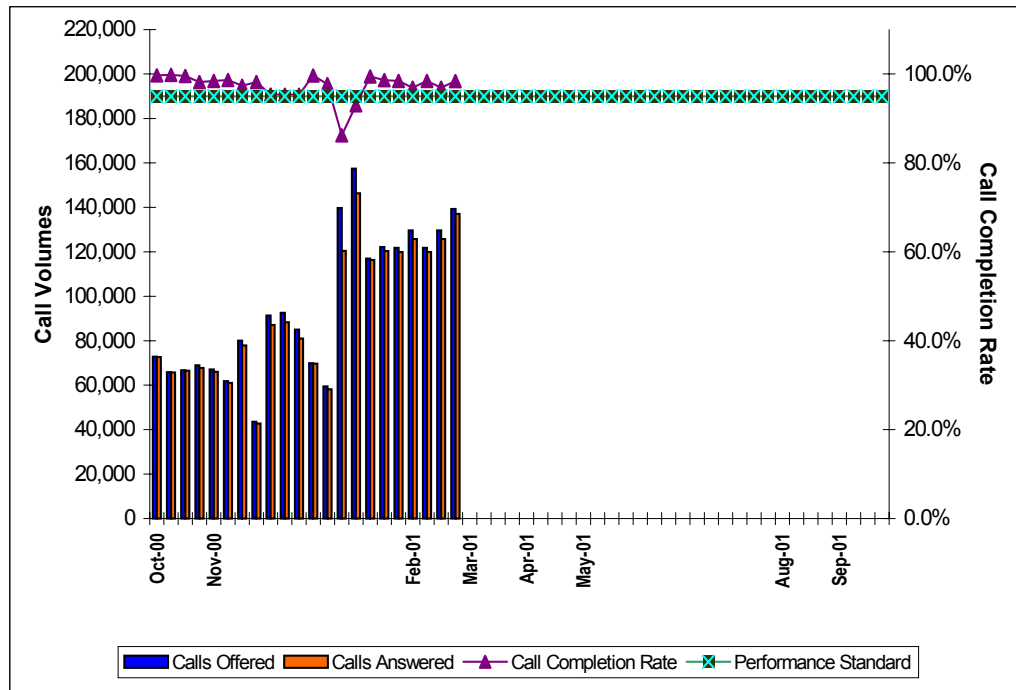
as of March 2, 2001

	Indicator ¹	Status
FP cont'd	Retire the FFEL System (Phase I).	
	Create the Data Mart (Phase I).	
CIO	Achieve 90% of the annual major modernization milestones that have been approved by the ITIRB.	
	Implement an infrastructure to support a standard branding view of all SFA data.	
	Reduce overall volume-adjusted operating costs for systems migrated to the data center by five percent.	
	Convert partner interfaces from a private network to the Internet.	
	Use data warehousing to provide information for management reporting and trend analysis.	
	Build the enterprise technical architecture including Middleware.	
	Enhance the security infrastructure based upon the framework and policies developed in FY 2000.*	
	Implement configuration management for SFA initiatives.	
	Complete the IT policies and procedures manual.	
	Implement three Electronic ID processes and test these with customers, external partners or employees.	
	Complete the migration of the Direct Loan Servicing System to the Virtual Data Center.	Dropped
	Publish Application Program Interface Standards for all technical services and some business services.	
	Develop the Enterprise Solution for electronic signature.	
CFO	Demonstrate enhanced SFA financial management.*	
	Provide full accounting capability for all SFA programs through implementation of the FMS.*	
	Obtain an unqualified opinion on the FY 00 SFA financial statement audit.*	
	Enhance the activity-based costing module to track unit costs and provide quarterly managerial reports.*	
Enterprise Areas	Expand SFANet to be the transaction tool for SFA's internal business.	
	Develop and implement a national outreach campaign to promote use of key SFA electronic products.	
	Design and deliver a course on student aid traditions to all SFA employees by December 15, 2000.	✓
	Deliver a course on "SFA Front-to-Back" that explains the processes involved in delivering financial aid.	
	Implement second generation Ombudsman Case Tracking System (OCTS 2.0).	
	Develop feedback loops to give operating partners quarterly reports of cases specific to their unit.	
	Develop and implement a research agenda focused on collecting and evaluating program performance.	
	Implement an integrated data collection and reporting process on program data to all SFA managers.	
	Pilot individual team-based scorecards.	
	Simplify FFELP Lender Due Diligence Regulations.	
	Create an SFA Policy Guidance Database.	
	Modify procedures to expedite the recruitment process.	
	Implement new employee incentives and recognition programs that support the performance plan.	
	Implement SFA Performance Development Process.	
	Implement a 'Partnership Program' to establish a better relationship with SFA Operating Partners.	
	Assume complete responsibility for the management of all SFA acquisitions and contracts.	✓
	Complete adoption of performance measures to appropriate legacy contracts.	
	Ensure new contracts include consistent and value-added performance measures.	
	Increase participation of small businesses in our contracts and in subcontracts by 5%.	
	Develop an automated contract management system to interface with SFA's FMS.	
	Provide performance-based training on acquisition management to all SFA managers.	
	Implement the recommendations of the Document Quality Control Group.*	
	Test all new products or modules with actual "end-users" to identify deficiencies prior to product release.	

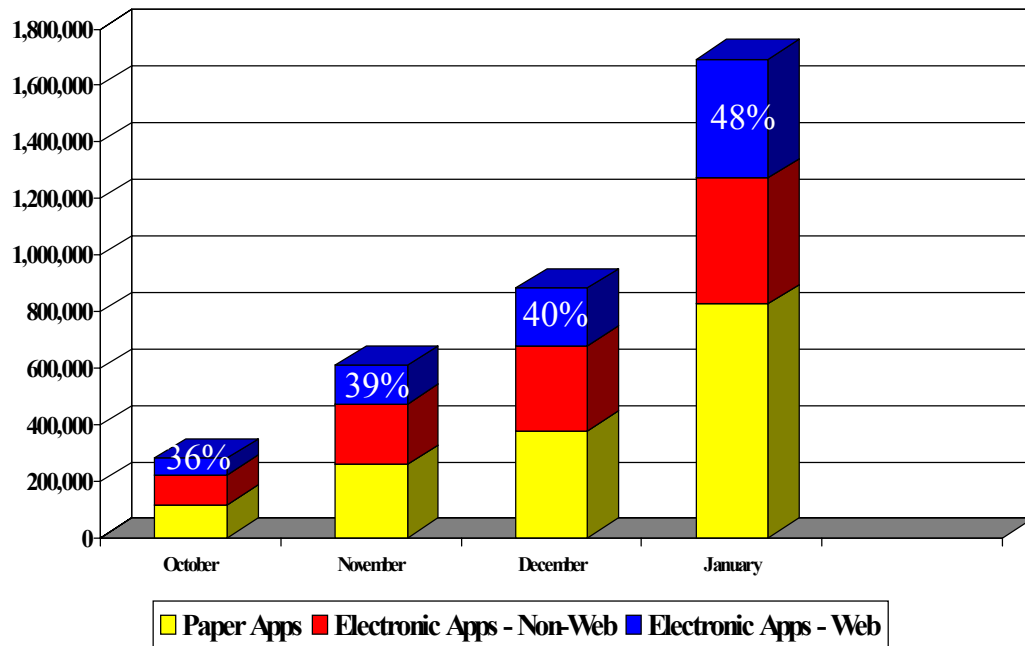
*Contributes to the goal of improving the financial integrity of student financial aid programs.

¹List is not exhaustive of all SFA operating goals and improvement projects.

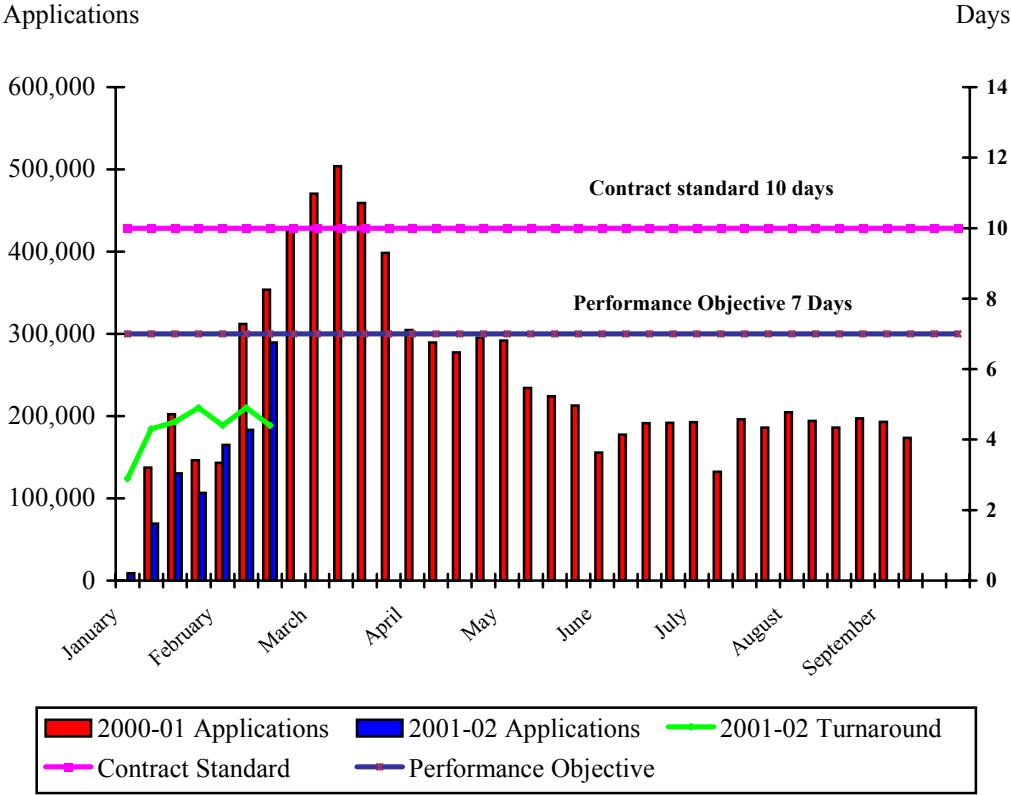
1-800-4FEDAID Calls



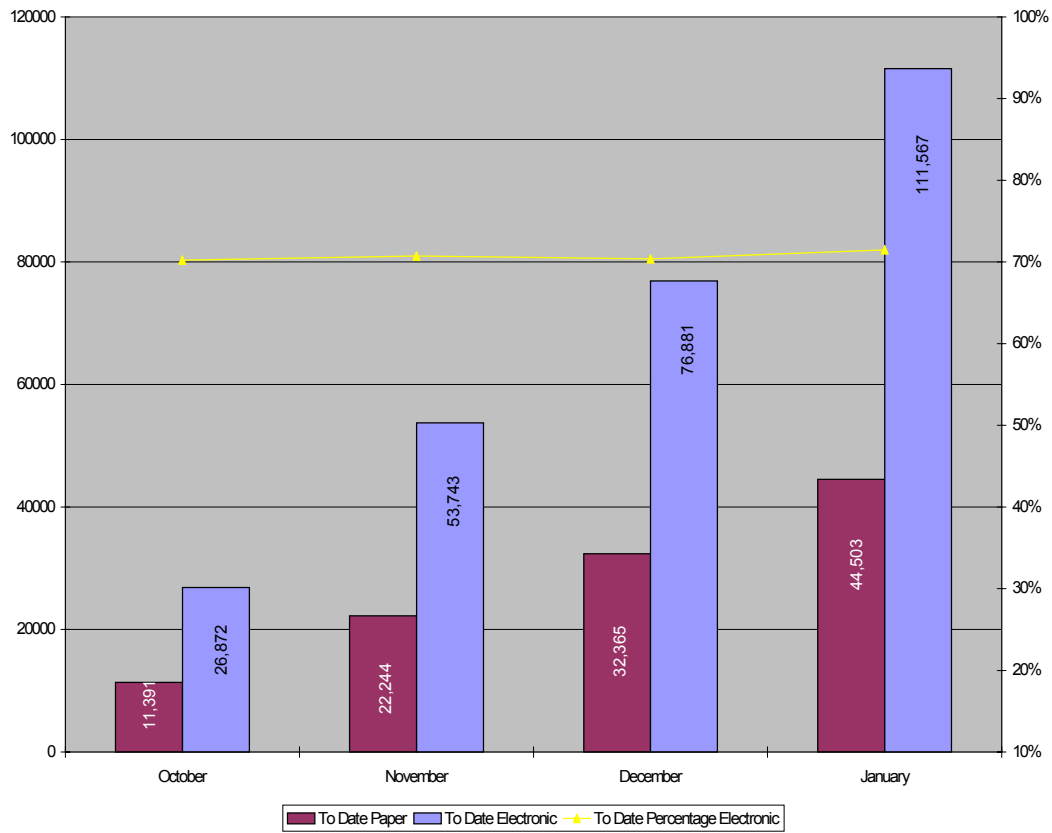
FAFSAs Processed in Fiscal Year 2001



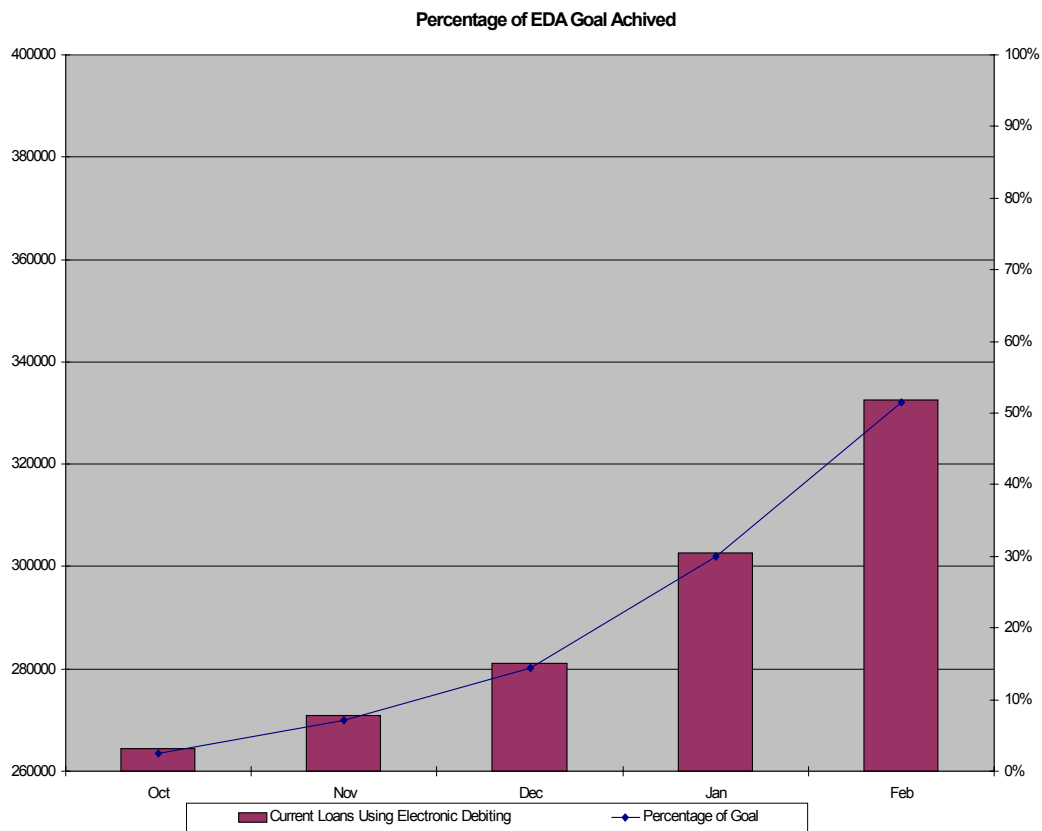
2001-2002 Application Volume Turnaround
Data for 2001-2002 as of March 11, 2001



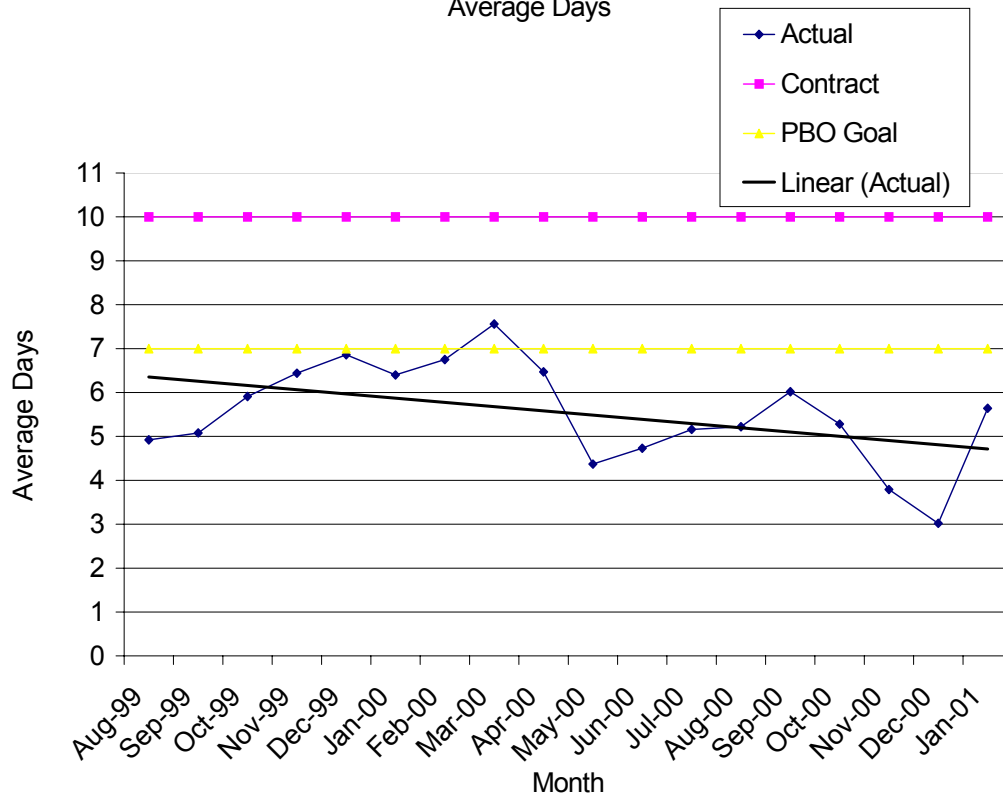
Cumulative Applications By Type



Repayment through Electronic Debiting



Turn Around Time for Deferments and Forbearances
Average Days



Direct Loan Servicing Web site (now available in Spanish)



Direct Loans Servicing Online

Elija Un Idioma:
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Bienvenido al Servicio en Línea de Préstamo Directo (*Direct Loans Servicing Online*). Este sitio Web es para estudiantes y padres que tienen Préstamos Directos (*Direct Loans*) o están considerando financiar una educación y desean saber más acerca de Préstamos Directos.

INFORMACIÓN DE CUENTA

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- [SalDOS de Cuentas](#)
- [Histórico de Pagos](#)
- [Total Deuda](#)
- [Formulario IRS 1098 E](#)

ADMINISTRAR CUENTA

- [Cambiar Dirección](#)
- [Asesoramiento de Salida](#)
- [Transacciones En Línea](#)
- [Estimación de Reembolso](#)

CENTRO DE AYUDA

- [Ayuda del Sitio Web](#)
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- [Glosario](#)
- [Cálculo de Intereses](#)

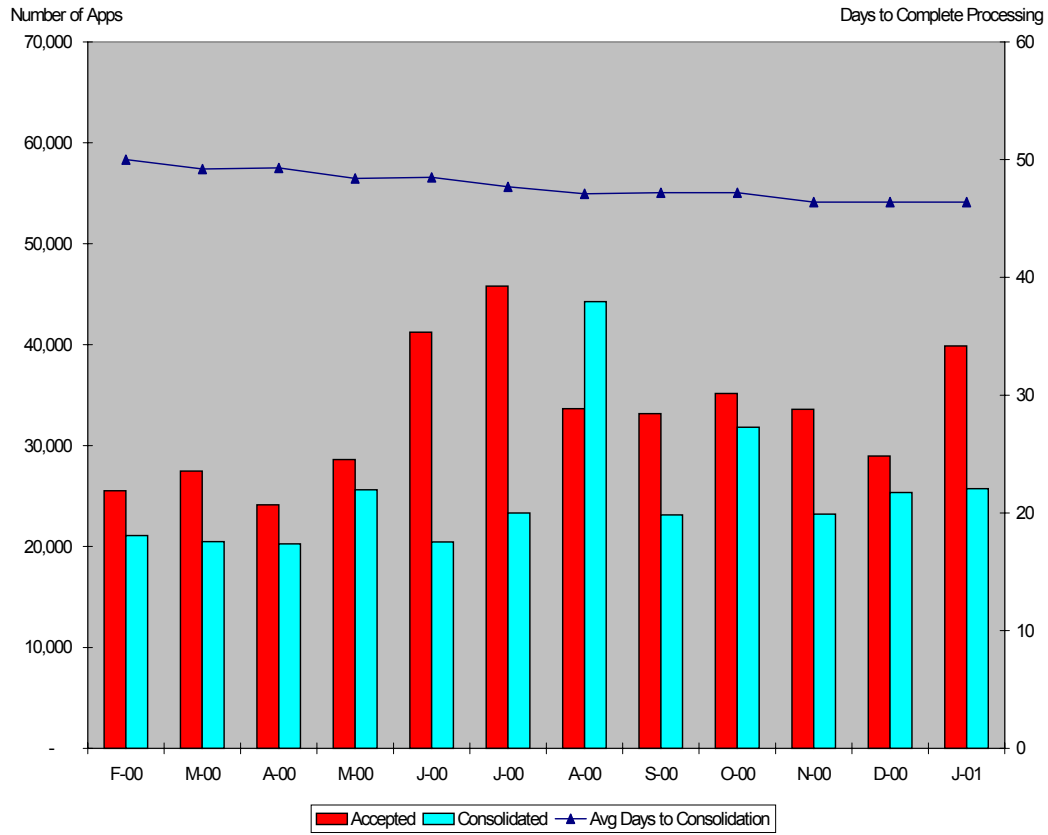
DESCARGAR FORMULARIOS

- [Cuenta de Débito Electrónico](#)
- [Aplazamiento \(*Deferment*\)](#)
- [Prórroga \(*Forbearance*\)](#)
- [Otros Formularios](#)

Haga Click Aquí Para
Solicitar un PIN

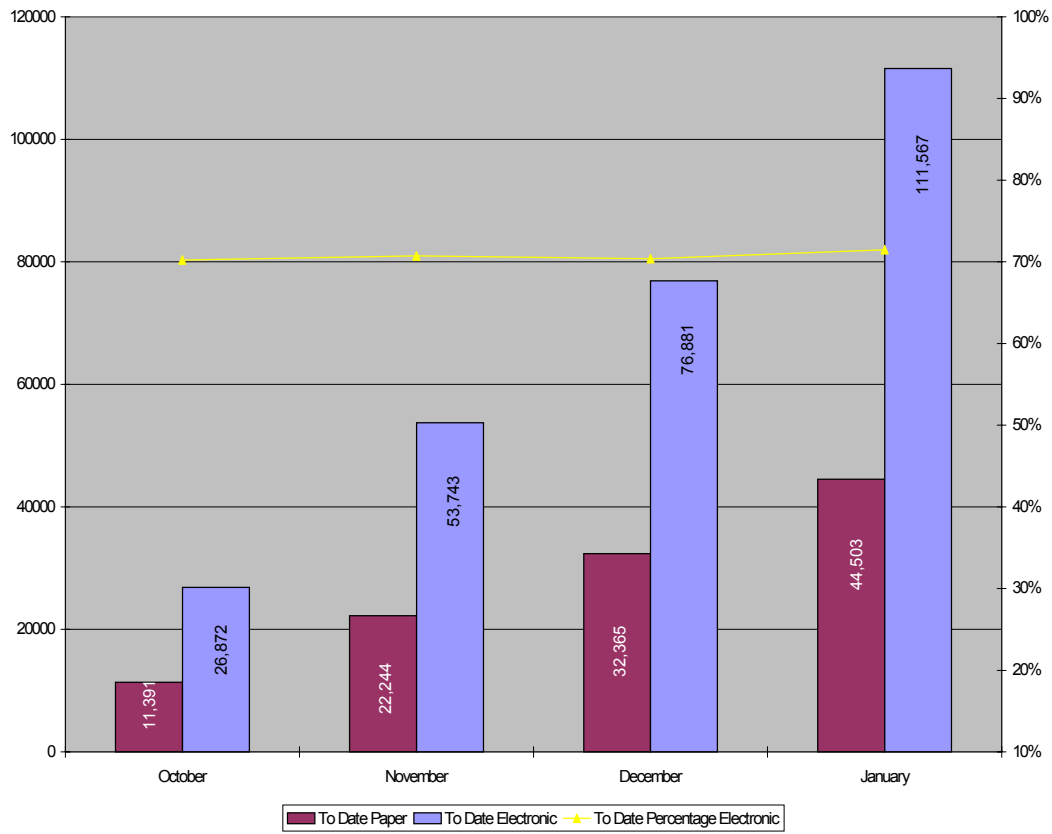
1 de marzo del 2001

Loan Consolidations



Consolidation Applications Filed

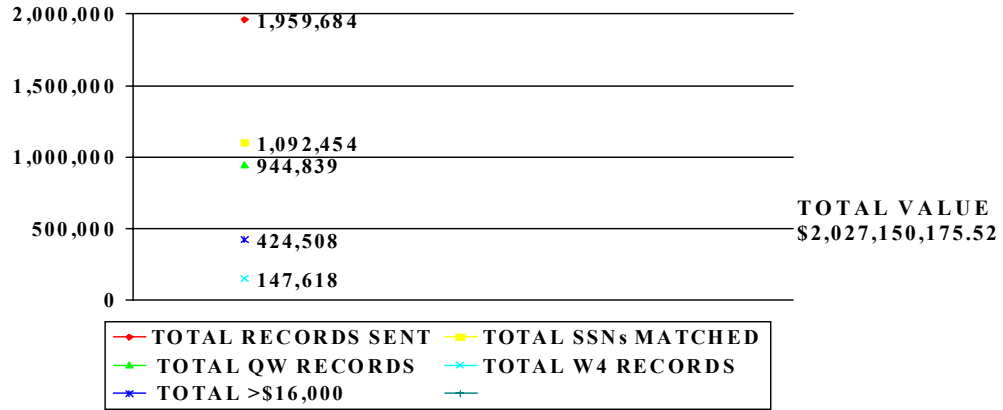
Cumulative Applications By Type



FIRST LIVE MATCH RESULTS

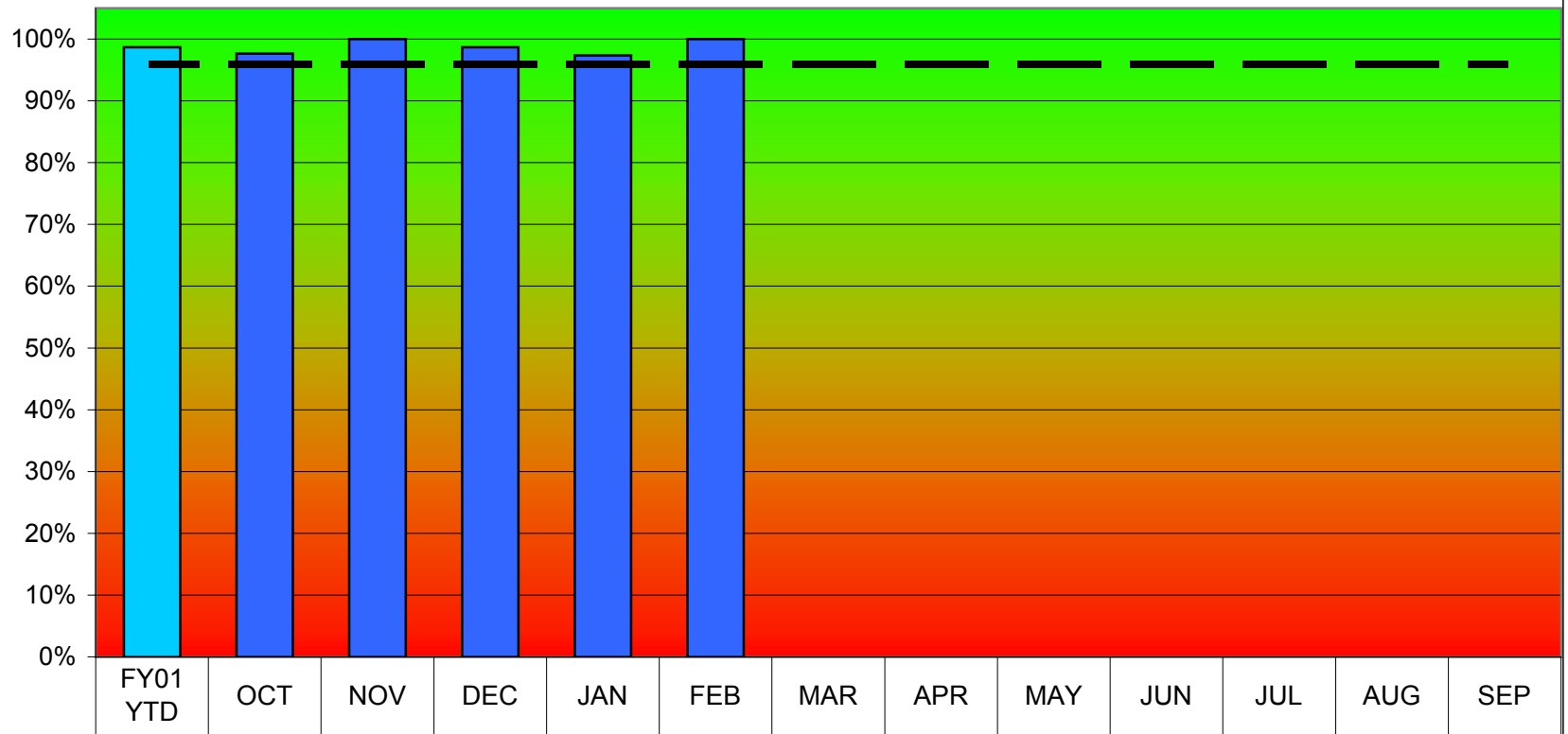
(January, 2001)

ED'S MATCH RESULTS



Goal: Complete 96% of reimbursement requests within 30

**Student Financial Assistance
Schools Channel
Case Management and Oversight
Reimbursement Performance FY 2001**

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